



Form **WH-4P**  
State Form 37365  
R/ 8-01

State of Indiana  
**Annuitant's Request  
for State Income Tax Withholding**  
(Please Type or Print Clearly)

Full Name \_\_\_\_\_

Home address (number and street) \_\_\_\_\_

City, State, and ZIP Code \_\_\_\_\_

Social Security Number

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A. Annuity contract claim or identification number..... A. \_\_\_\_\_

B. Enter the amount of Indiana tax to be withheld from each annuity or pension payment..... B. \$ \_\_\_\_\_

I request voluntary income tax withholding from my annuity or pension payments.

Signature of Annuitant \_\_\_\_\_

Date \_\_\_\_\_

### Where can you get help?

You can visit or call any of the following offices. These offices are open Monday through Friday from 8:15 a.m. to 4:45 p.m.

**Bloomington Office**  
(812) 339-1119

**Clarksville Office**  
(812) 282-7729

**Columbus Office**  
(812) 376-3049

**Evansville Office**  
(812) 479-9261

**Fort Wayne Office**  
(260) 436-5663

**Indianapolis Office**  
(317) 232-2240

**Kokomo Office**  
(765) 457-0525

**Lafayette Office**  
(765) 448-6626

**Merrillville Office**  
(219) 769-4267

**Muncie Office**  
(765) 289-6196

**South Bend Office**  
(574) 291-8270

**Terre Haute Office**  
(812) 235-6046



## Indiana Estimated Tax and Your Retirement Income

Have you recently retired, or are you about to retire?

Most Indiana taxpayers have money automatically withheld by their employers from wages to cover state and county taxes, but when you retire different arrangements need to be made.

Since no state or county tax is automatically withheld from your retirement income, you need to decide if you want to have your pension company withhold the tax for you, or if you want to make estimated tax payments for yourself.

By waiting to pay your total amount of tax due on the annual Indiana Individual Income Tax Return, you could be making a costly mistake.

State law requires estimated tax payments to be made if you owe \$400 or more.

Indiana  
Department  
of Revenue



Brochure #2  
Revised 11-02

### What should you do?

- You can directly contact the company that pays your pension and ask them to withhold Indiana state income tax from your pension income.

- If the above can't be done, you can figure how much tax you will owe so that you can make estimated tax payments during the year. You may make your first quarter estimated payment on your Indiana Individual Income Tax Return or with form ES-40, Estimated Tax Payment Return, available from the Indiana Department of Revenue.

### You need to know...

- If the amount owed (before any first quarter estimated tax payment is added) on your Indiana Individual Income Tax Return is more than \$400,

or

- The total amount of your estimated tax paid is not at least 90% of the state and county tax due on your Indiana Individual Income Tax Return, or 100% of the state and county tax due on last year's Indiana Individual Income Tax Return, it may cause a penalty to be assessed.

**Note:** *If last year's Indiana adjusted gross income was more than \$150,000 (\$75,000 for married filing separately), you must pay at least 112% of last year's tax.*

You will want to see that either your pension company withholds state income tax, or you make estimated payments in a timely manner to avoid any underpayment charge.

To have state taxes withheld from a civil service annuity, contact the Office of Personnel Management at 1-800-409-6528 or 1-202-606-0500, or write: OPM, PO Box 961, Washington, DC 20044-0001.

### Additional forms or bulletins available to you:

- Form **ES-40** is to be used to set up an estimated payment account with the Indiana Department of Revenue.

- Income Tax **Information Bulletin #3** will give you information on estimated tax vouchers, preprinted estimated tax booklets, and calculating estimated tax payments.

- Form **IT-2210** is to be used to calculate penalty.

### For your convenience...

We have enclosed a form WH-4P, an Annuitant's Request for State Income Tax Withholding. This form, when completed, will allow the person or company paying your pension to withhold Indiana income tax for you.

### Do you have questions?

If you have any questions about retirement income, you may contact the Indiana Department of Revenue by telephone at (317) 232-2240. The Telephone Device for the Deaf (TDD) number is (317) 232-4952. You may also call one of our District Offices for information (see back panel for telephone numbers).

If you choose to write, the address is:

**Indiana Department of Revenue  
IGCN - 105  
100 N. Senate Avenue  
Indianapolis, IN 46204-2253**

If you have an income tax preparer, ask for help to figure how much estimated tax you owe. They can get the proper forms and help you fill them out. You may also come to one of our offices and we would be happy to help you.

You may select any amount over \$10.00 you wish to have withheld from your annuity or pension payment. This withholding will be reported to you on a W-2P at the end of each year as Indiana Tax Withheld. The County Adjusted Gross Income Tax (CAGIT), County Option Income Tax (COIT), or the County Economic Development Income Tax (CEDIT) cannot be withheld. However, if you overpay your state tax liability, this overpayment may be applied to your county liability.

**A.** Enter the Contract, Policy, or Account Number to which the request applies.

**B.** Enter an amount, not less than \$10.00 that you wish to have withheld from each check.

After completion, this form should be submitted to the person or company paying your pension. **Do not** send this to the Department of Revenue.

